

NCHER CONNECT

User's Guide

For Seekers & Providers

What this guide covers

A practical walkthrough of the public-facing NCHER Connect experience: creating requests and provider profiles, understanding matches, using anonymous conversations, sharing contact information, receiving notifications, and closing activity correctly.

Public-facing platform documentation

NCHER Connect v1.0.7 - Launch Version

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1. Getting Started

NCHER Connect is a matching and messaging platform designed to help organizations seeking services connect with qualified providers. The platform supports two public-facing roles: service seekers and service providers.

The basic workflow:

From need to conversation

1. A seeker signs in and submits a service request.
2. NCHER Connect compares that request with active provider profiles.
3. The seeker reviews match percentages, matched categories, and provider value propositions.
4. The seeker opens an anonymous conversation with a provider of interest.
5. The provider is notified only after the seeker sends the first message.
6. Either party can share contact information intentionally when ready.
7. Inactive conversations and completed requests are closed to keep the platform current.

Opportunity IDs

Each seeker request receives a short five-character alphanumeric Opportunity ID, such as MLWK6. Use this ID when referring to a request in NCHER Connect without exposing the seeker's identity.

Important privacy point

A seeker's website URL is not displayed in the anonymous conversation view. This helps protect identity until the seeker chooses to reveal contact information.

2. Seekers: Create a Service Request

Use the Service Seeker Request form when your organization needs a product or service and wants to be matched with providers. The form is intentionally detailed because better information produces better matches.

Required information

- Organization / Company Name
- Contact Name
- Contact Phone
- Contact Email
- Website URL
- At least one Service Category Sought (maximum of five)
- Implementation Timeline
- Additional Keywords / Priorities
- Project Description / Services Sought Details
- The anonymity and provider-contact confirmation checkboxes shown on the form

Choosing service categories

- Choose only the categories that genuinely describe the need. More categories do not automatically mean better matches.
- A seeker can select up to five service categories for each request.
- Use Additional Keywords / Priorities to add useful context that may not fit neatly into a category.

After you submit

You stay on the request page and receive a confirmation message that the submission was received. NCHER Connect generates matches and the request becomes available on the Seeker Dashboard.

Tip

Write the Project Description as if a provider will use it to decide whether the opportunity is a good fit. Clear goals, timing, and deliverables produce more meaningful conversations.

3. Seekers: Review Matches

The Seeker Dashboard groups any matches under each opportunity. Ordinary seeker accounts see their own opportunities. Administrators may see all opportunities, but those administrative capabilities are intentionally not covered in this user guide.

What you will see for each matched provider

- Provider company name
- Match percentage
- Matched service categories shown as a bullet list
- Seeker Service Details
- Company's Value Proposition
- Conversation button and current conversation status, when a conversation exists

How to interpret the match percentage

The match percentage is a decision-support tool. It reflects how well the request aligns with information in the provider profile, including service categories, keywords, timing, and other matching inputs. It is not a guarantee, endorsement, or substitute for your review of the provider.

Before opening a conversation

1. Review the matched categories.
2. Read the provider's value proposition.
3. Consider the match percentage as one signal, not the only signal.
4. Open a conversation only with providers you want to explore further.

4. Anonymous Conversations

NCHER Connect allows a seeker and provider to communicate before the seeker shares identifying details. The seeker controls when that identity is revealed.

Opening a conversation

1. Click Open Conversation on the selected provider match.
2. The conversation page opens. Simply opening it does not send an email to the provider.
3. Write and send the first message.
4. The provider then receives the New Anonymous Inquiry notification email.

Conversation status

Status	What it means
Unread	A new message needs attention.
In Conversation	The parties are actively communicating.
Closed - identity revealed	The conversation ended after identity/contact information was revealed.
Closed - not selected/other	The conversation ended without an identity reveal or for another reason.

Status indicators appear next to conversation controls on the Seeker and Provider Dashboards so users can quickly see where a discussion stands.

5. Sharing Contact Information

Contact information should be shared intentionally. NCHER Connect provides checkboxes that add saved contact details to the reply being sent.

For seekers

Use the checkbox labeled:

Reveal my contact information to this provider.

(This will add your Organization, Name, Phone Number, and Email to your reply above.)

For providers

Use the checkbox labeled:

This reply includes provider contact information.

(This will add your Organization, Name, Phone Number, and Email to your reply above.)

Use these choices deliberately

Sharing contact information changes the conversation from anonymous portal messaging to an identified relationship. Make sure you are ready before selecting the checkbox.

6. Closing Conversations and Requests

Closing inactive activity keeps dashboards, reports, and follow-up work accurate. NCHER Connect now asks for confirmation before a user closes a conversation or request.

Closing a conversation

Close conversation workflow

1. Click Close Conversation. The close-reason choices remain hidden until you click this button.
2. Choose one radio-button reason: Seeker Identity Revealed; Opportunity No Longer Considered; or Other.
3. If you choose Other, enter a written reason. The text field is required for that selection.
4. Click Confirm Close Conversation.
5. Confirm the final warning prompt.
6. After closing, you remain on the Conversation page and receive the message: We have closed this conversation.

When to close a conversation

- The provider is no longer being considered.
- The seeker has revealed identity/contact information and the parties are moving the discussion outside the platform.
- The discussion has otherwise reached a natural end.

Closing the overall request

Close the request when the entire opportunity is complete, no longer active, or the seeker has finished evaluating providers. The Close Request action includes a confirmation warning before the request is closed.

Conversation vs. request

A conversation is one provider-specific discussion. A request/opportunity is the seeker's overall need and may have several provider matches and conversations. Close individual conversations as they end; close the request when the whole opportunity is finished.

7. Providers: Build Your Company Profile

The Provider Company Profile is the foundation of provider matching. Keep it complete and current so NCHER Connect can compare your capabilities with open seeker requests.

Required provider information

- Company Name selected from the approved organization/company list
- Website URL
- Contact Name
- Contact Phone
- Contact Email
- Availability
- Profile Status
- Elevator Pitch
- Full Company Description
- At least one Service Provided
- Specialty Keywords

Saving the profile

After saving, you remain on the Provider Profile page and receive a confirmation that the profile was saved. A confirmation email is also sent with the submitted profile information.

Matching tip

Select every service category your organization genuinely provides and use specific specialty keywords. Provider profiles are not limited to five service categories.

8. Providers: Review Opportunities and Reply

The Provider Dashboard shows opportunities and conversations associated with the provider profile. Opportunities are paginated in groups of five, with centered page navigation when more than five are available.

What providers see

- Opportunity reference
- Match percentage
- Matched categories
- Relevant seeker request details
- Conversation status
- Open Conversation button for active discussions

Responding to a new inquiry

Provider response workflow

1. Open the notification email or visit the Provider Dashboard.
2. Open the conversation.
3. Review the anonymous request details and previous messages.
4. Write a useful response focused on fit, capabilities, questions, and next steps.
5. Optionally include provider contact information using the contact-information checkbox.
6. Send the reply. The seeker receives an email notification.

9. Email Notifications

NCHER Connect sends branded HTML email with a plain-text alternative. The email template includes the NCHER Connect logo and a button that links to the WordPress-configured NCHER Connect homepage. Outlook-compatible button markup is included for organizations still using Outlook desktop.

Common notifications

- Request submission confirmation
- Provider profile save/update confirmation
- New anonymous inquiry to a provider after the seeker sends the first message
- Provider reply notification to the seeker
- Seeker reply notification to the provider

If you do not see an email

- Check Spam, Junk, Clutter, or organizational quarantine folders.
- Confirm that the email address on your request or profile is correct.
- Contact an NCHER Connect administrator if a notification needs to be resent.

10. FAQ and Best Practices

Does opening a conversation notify the provider?

No. The provider is notified when the seeker sends the first message.

Can providers see the seeker website URL during anonymous conversation?

No. The website URL is intentionally hidden from the anonymous conversation view.

Why can seekers choose only five service categories?

The limit keeps matching focused. Providers can select all service categories they genuinely offer.

What if I accidentally start to close a conversation?

The close reasons do not appear until you click Close Conversation, and a Cancel button lets you back out before anything is closed.

Can a normal user reopen a closed item?

Reopening is an administrator function. Contact an NCHER Connect administrator if an opportunity or conversation was closed incorrectly.

What does the match percentage mean?

It summarizes alignment between the seeker request and provider profile. It is a guide rather than a guarantee or endorsement.

Best practices

- Keep request and provider profile information complete and current.
- Use matched categories and the value proposition together; do not rely on percentage alone.
- Keep early seeker conversations anonymous until there is a reason to identify the organization.
- Use the built-in contact-information choices when intentionally sharing contact details.
- Close inactive conversations and completed requests promptly.
- Return to the portal for the latest conversation and opportunity information.

NCHER CONNECT

Clear matching. Private conversations. Better connections.